



HESPERIAN *Wealth*

# Impact & Values

We can help you make a positive impact with your portfolio and invest in ways aligned with your values.

At Hesperian, we specialize in impact investing and values-based investing. The first step is knowing yourself as an investor. Do you want to invest for the future while making a positive impact on the world around you? Or do you want to express your values and beliefs through your portfolio out of a sense of personal responsibility? Or is it a mix of both? No matter what your motivations, we'll help you engage with your portfolio on a deeper level and feel proud of how you've invested.

## Be Impactful

From an impact investing perspective, it's less about what investments you're screening out and more about the willingness to invest in some imperfect companies because you know your money's managed by teams working to transform them. The simple fact is: *You can't change what you don't own.* Ownership gives you a seat at the table and the chance to move a company in the right direction.

Out of our deep due diligence, we've identified a select group of investment options run by firms dedicated to reforming capitalism through shareholder votes and corporate engagement. And we monitor their activities and regularly report on what they are doing and achieving because that's what our clients are paying for—to fund this work and achieve demonstrable impact.

## Uphold Your Values

You may feel a moral imperative not to support corporations whose industry or behavior is at odds with your faith, your values, or the issues you care about. In that case, screening out certain investments does make perfect sense. There may be funds that can help you achieve this aim cheaply without taking on undue risk. On the other hand, they might employ screens you either don't care about or are even opposed to. If you want to take a more active role, the best approach for values-based investors may involve personalized screens and direct ownership, which incidentally can offer additional tax and diversification benefits as well. We can help you understand your values and build a portfolio just for you.



## Walking the Walk

With our support of impact investing and values-based investing—we walk the walk. While we aren't the engineers, scientists, or political leaders who are going to solve the many problems facing us directly, we *can* give back the way we know how:

- **By Taking Action Ourselves**—From time to time, we will sign on to shareholder letters related to causes our clients care about. We'll also help the many groups and nonprofits in our network that are working for change any way we can.
- **By Doing Our Part**—As a virtual advisor, we have a low carbon footprint already. And we try to keep our fees as low as possible to expand access to financial advice.
- **By Serving Our Community**—Every Hesperian wealth manager makes an annual commitment to provide free advice to members of our community who can't afford it.
- **By Putting Our Money Where Our Mouth Is**—On the investment management side, we extend our clients' reach by donating 10% of our investment management fees to organizations working tirelessly toward a better world (more details on the next page).

## Our Clients Make the Difference

Hesperian's partnership with clients makes all this work possible, so we sincerely thank them. And it's in keeping with the dual mandate many of them charge us with: Seek the returns they need to reach their financial goals while also effecting positive change. That's what impact investing and values-based investing should be all about.

**Schedule a free, no-obligation Discovery Meeting to learn more:**

**SCHEDULE**

### Our Giving Pledge

Each Giving Tuesday (the Tuesday after Thanksgiving), we donate 10% of the investment management fees we've received over the last year to the organizations we support:

**Natural Capital Project**



**AS YOU SOW**

Hesperian Wealth LLC (HW) is not affiliated with any nonprofit we donate to. Neither the selection of any organization to support nor the inclusion of their logo or donate link in this brochure should be construed as any third-party recommendation of HW or its services.

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